DISTRICT/LEA AND SCHOOL ADMINISTRATOR GUIDE FOR PLANS

WestEd Tracker version 3.2

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Introduction

Putting Your Plan into Tracker

Your Plan Leadership Team will likely write your plan offline initially. For entering Plan information into Tracker, it is recommended that you have an electronic copy of your Plan (such as a Word document) rather than a paper version. This will make it easier for you to copy and paste detailed information from your Plan into Tracker.

Note: District/LEA and school plans in Tracker are nearly identical in their functionality and management and are described here generically as "plans." Certain features, such as plan tags and funding sources are inherited by school plans from the LEA plan. These functions are described below.

Plan Organization

Tracker uses a tiered structure for plans: goals, strategies, action steps, and tasks. You may also create a budget for your plan, and track expenses as you implement the action steps

Goal	A specific, measurable target for students to achieve. States <u>Who</u> will do <u>What</u> by <u>When</u> and <u>How</u> you will know it. (You may write them in SMART format: Specific and Strategic, Measurable, Achievable/Attainable, Results-oriented, and Time-bound.) LEAs may have some goals pre-assigned by the State, and may also add their own, local goals. Schools may select goals from the LEA plan, and re-write them to reflect the school's achievement target, and create their own goals. Title: Maximum 50 Characters Description: Maximum 1000 Characters
Strategy	A general description of a process an LEA or school will take to reach the student achievement goal. Each goal may have several strategies. What will the district/school do to ensure that the goal is reached? Title: Maximum 50 Characters Description: Maximum 500 Characters
Action Step	A specific action or activity that will lead to the implementation of the strategy and achievement of the goal. The action step includes a **Title**, **Description**, **Begin** and **End Dates** plus comments on timelines, persons responsible, costs and budget sources, and an indication if the step is related to professional development (PD). Progress is tracked by updating status, attaching evidence, and adding comments as the step is implemented. Action steps may also be "tagged" for filtered views of the plan, e.g. all steps affecting Special Education students. Each strategy may have several action steps. Title: Maximum 50 Characters Description: Maximum 1000 Characters

Task	A specific action/activity that leads to the completion of an action step. Tasks have specific due dates, persons responsible and current status. Each action step may have multiple tasks.
	Title: Maximum 50 Characters Description: Maximum 255 Characters

Preparing for Plan Entry

Plan Administrators must set up certain functional areas in preparation for plan use. This setup should be done before your team starts entering or significantly modifying the plan, so that all features are available.

Users

LEA and school users who are associated with your LEA have access to your LEA and school plans. Users assigned to the LEA or school may update most areas of the plan:

> Add or edit strategies, action steps, tasks, budget items and status updates
> View and upload documents
> View and add comments on plan elements

These users may also be assigned as a person responsible for an action step or task.

Note: In order to support users who provide services in multiple districts or schools, LEA or school level users in Tracker may be assigned to more than one organization. As a district or school administrator, you may only add or change user information specific to your organization(s); you may not modify information from other organizations, or retire a user who is actively assigned to other organizations.
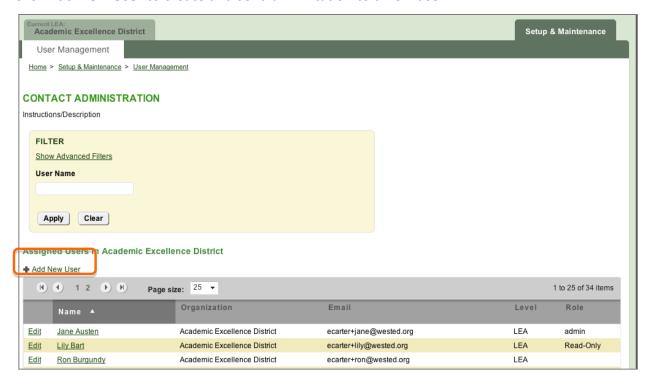
Add Users

To add a new user, click the **Setup & Maintenance** link at the top of any page. Only LEA and School Administrators will see this link.
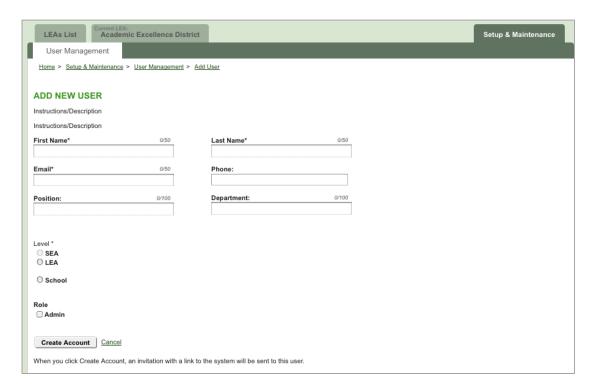

From the Setup & Maintenance menu, select **User Management**. You will see a list of all users currently assigned to your organization, and can search for users if needed.

Click **Add New User** to create and send an invitation to a new user.

To add a user, complete the requested information. Select the **Level** (LEA or School) and the appropriate organization from the dropdown lists. The Level assigned to the user determines their access. Check the **Admin** box if the new user should have administrator privileges.
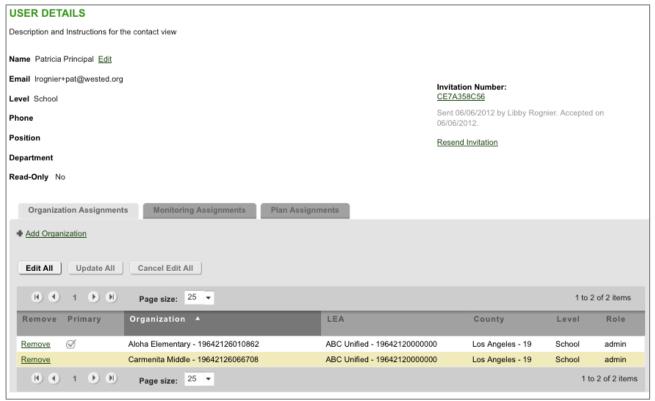

Click **Create Account** to send an email invitation, with a link to Tracker, to the new user.
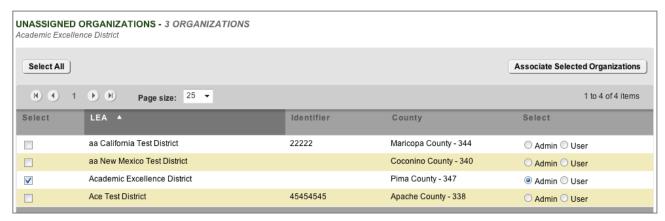
User Access Levels

- **LEA User:** LEA Users can create plan strategies, action steps, and tasks, and upload documents to the File Cabinet. LEA Users can also see, comment on, and attach files to school plans in the LEA.
- **LEA Administrator** (Must be added by the SEA): In addition to performing all the functions of an LEA User, LEA Administrators have the ability to create new users in their district (LEA and school level), create LEA tags, manage goals and add or edit funding sources for the plan. They also have the ability to edit school plans in the LEA.
- **School User:** Where school plans are available, school users may perform all of the plan functions that LEA Users may perform. For LEA plans, school users may upload documents and post comments. They may see other schools' plans, but may not edit them.
- **School Administrator** (May be added by LEA Admin or SEA): In addition to performing all the functions of a School User, School Administrators have the ability to create new users for their school. They can manage goals and add or edit funding sources for their school plan.
- **Read-Only:** A user at any level may be designated as Read-Only. These users may view all information described here, but cannot modify any information within the system. Read-only users are not available for any plan assignments and may not receive posted comments. Please contact your State Administrator to request this option for a user.

User Management

User Management tools allow you to add or change user assignments or roles, and retire or disassociate users who no longer belong to your LEA or school. Click on the user name from the list of users to see details of their user account.

USER DETAILS

Description and Instructions for the contact view

Name Patricia Principal Edit

Email lrognier+pat@wested.org

Level School

Phone

Position

Department

Read-Only No

Invitation Number:
CE7A358C56

Sent 06/06/2012 by Libby Rognier. Accepted on 06/06/2012.

Resend Invitation

| Organization Assignments | Monitoring Assignments | Plan Assignments |

➕ Add Organization

Edit All | Update All | Cancel Edit All

|◄ ◄ 1 ► ►| Page size: 25 ▼   1 to 2 of 2 items

Remove	Primary	Organization ▲	LEA	County	Level	Role
Remove	✓	Aloha Elementary - 19642126010862	ABC Unified - 19642120000000	Los Angeles - 19	School	admin
Remove		Carmenita Middle - 19642126066708	ABC Unified - 19642120000000	Los Angeles - 19	School	admin

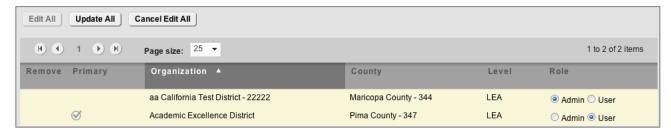|◄ ◄ 1 ► ►| Page size: 25 ▼   1 to 2 of 2 items

To assign the user to additional organizations, use the Organization Assignments tab and click **Add Organization**. Select the appropriate organizations for assignment and the user level for each, and click the **Associate Selected Organizations** button.

If a person is associated with more than one organization, you may select a primary organization for the user, if you are an administrator for each of that user's assigned organizations. The primary organization name will appear with their user name in comments and user lists. Click the Edit link on the user's profile to select the primary organization. To remove access to organizations from a user, click the **Remove** link on their organization assignments list.

To change the user's role between User and Admin, click the **Edit All** button above the Organization Assignments list, then use the radio buttons to select the role. NOTE: you will only be able to change the role for those organizations to which you have administrative access.
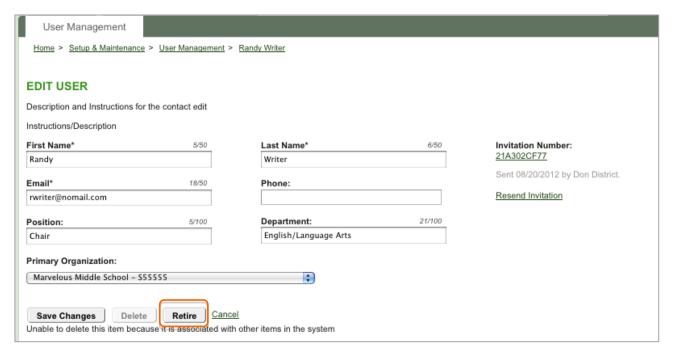

Retire a User

When a user has left your organization or changed roles, you may wish to retire them from active access to Tracker. Retiring a user removes all associated organizational assignments from the user account, including all monitoring and plan roles. Retired users cannot log into Tracker, will not receive e-mail communication, and cannot be assigned to any monitoring or plan role.
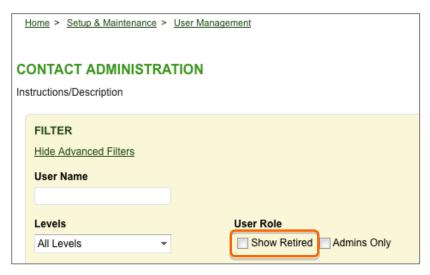
All activity tracked by the system will continue to be displayed for a retired user (such as recorded actions on an Action Step Status History or File Cabinet information about who uploaded a document) but the user's previous monitoring and plan roles will not be displayed anywhere in the system, including the user profile or the monitoring or plan assignment and display pages.

To retire a user, view the user's profile and click the **Edit** link next to their name**.** Click the **Retire** button on the Edit page. View the warning and confirm. Removing all organization assignments from a user will also mark them as retired.

View Retired Users

To view retired or unassigned users, use the **Show Retired** filter on the User Management list, in the Advanced Filters view.

Reinstate a User

Adding an organization association to a retired user record will reactivate the user. This will not reinstate any previous monitoring or plan roles.
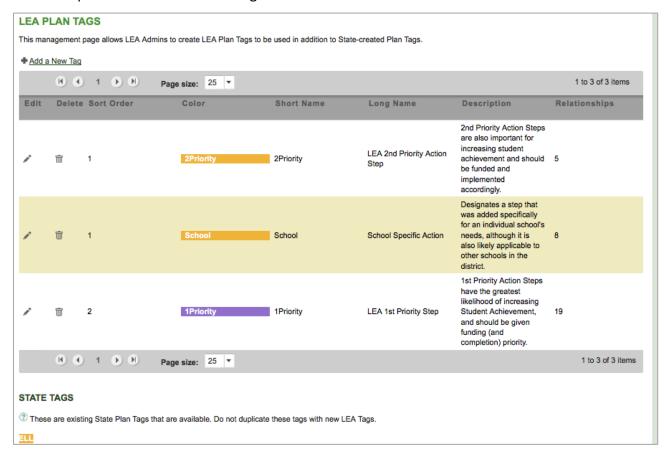
LEA Tags

In addition to the plan tags created by the SEA, the LEA administrator may create a local set of tags to support plan management and implementation needs. LEA Tags are available in the LEA and school plans.
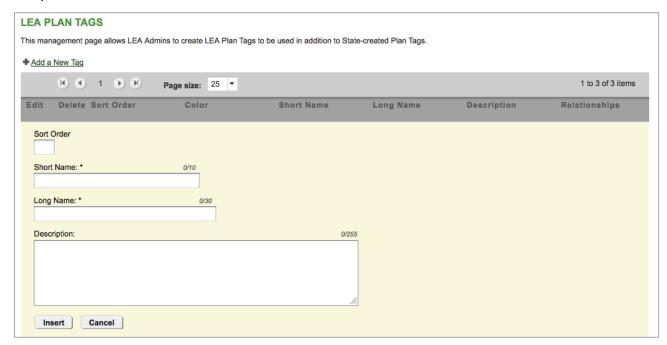
To add LEA tags, click the **Plan Tags** link in the top navigation bar on the LEA Overview page:

You will see a list of LEA Tags already created, as well as a list of all SEA tags as reference. You may edit or delete existing LEA tags, or add a new tag. The Relationships column tells you how many action steps are marked with that tag.

Click **Add a New Tag** to create additional LEA tags. The sort order is numeric, and values of 1-8 also determine the color of the tag. Tags with sort values 8 or higher appear grey in color. The short name field may be up to 10 characters, no spaces, and appears in the tag icon throughout the plan. The long name and description fields appear when hovering over the tag label anywhere in the plan.

LEA PLAN TAGS

This management page allows LEA Admins to create LEA Plan Tags to be used in addition to State-created Plan Tags.

✚ Add a New Tag

⏮ ◀ 1 ▶ ⏭	Page size: 25 ▾					1 to 3 of 3 items
Edit Delete Sort Order	Color	Short Name	Long Name	Description	Relationships

Sort Order
[   ]

Short Name: *   0/10
[   ]

Long Name: *   0/30
[   ]

Description: 0/255
[   ]

[Insert]   [Cancel]

Click **Insert** to save your tag and add it to the LEA tag list. You may also edit any existing LEA tags by clicking the pencil icon, or delete a tag by clicking the trash can icon. You can assign any or all SEA and LEA tags to any action step. However, only up to 8 of each type of tag will appear on the Plan Overview for an action step. Both sets of tags will show in the filters on the Plan Overview.

Tag Sort order colors:

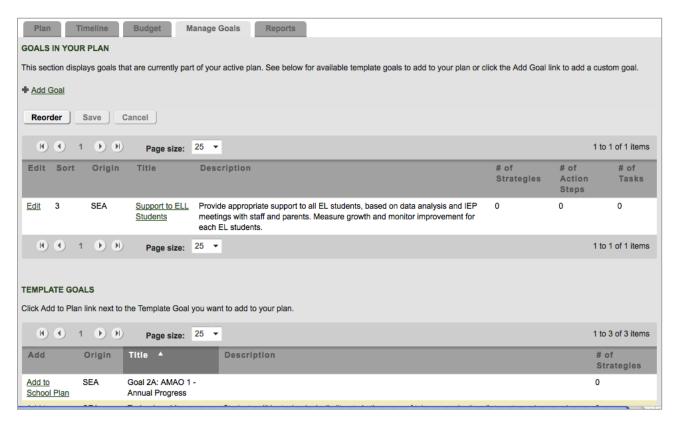| 1 = yellow	3 = light blue	5 = dark blue	7 = brown
2 = purple	4 = orange	6 = green	8+ = grey

Goals

The state may pre-assign goals and strategies to your plan. You may add a local description to each to fit your needs. You may also create additional strategies under a state-assigned goal, but you cannot remove the assigned goals or strategies from the plan.

Plan Administrators may add new goals to the LEA or school plan. All users can add and edit strategies, action steps and tasks. To add a goal, click the **Manage Goals** tab on the Plan Overview. If you are not an Administrator, you will not see this tab.
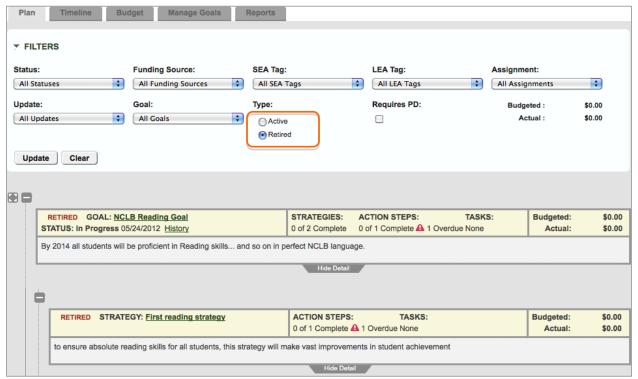

The Manage Goals page shows the list of goals currently in your plan, and a list of state goal templates available for use in your plan. Goal templates are created by the SEA and may contain pre-defined resources, evidence and strategies. You may edit the current goals, add a state goal template, or add a new goal. You may also re-order goals to determine how they appear in your plan.

The Origin column indicates at what level the goal was first entered into Tracker. If the state created goals that are auto-assigned to your plan, the origin will be SEA. If you edit a state-created goal template, you will be able to customize the description, but may not change the title of the template. If you add a new goal, the origin will appear as LEA for LEA plans and School for school plans.

The state may retire goals that were assigned to LEAs or schools in previous years. If so, the retired goals, with their associated strategies, action steps and tasks may be viewed by selecting the **Retired** filter on the Plan Overview. You may reactivate retired plan elements from this view.
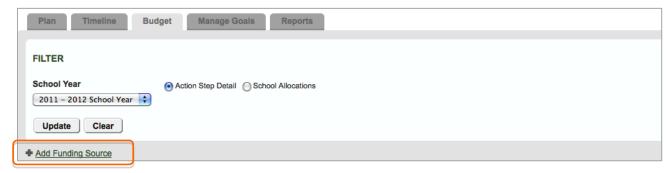

Click the goal name, and then click the **Activate** button on the Edit Goal page to add the goal back to your active plan.

Budgets

Budgets allow users to associate specific plan activities with funding streams. The Plan Administrator must add funding sources and related allocations to the plan budget. These sources are then available for assignment to budget items throughout the LEA and school plans.
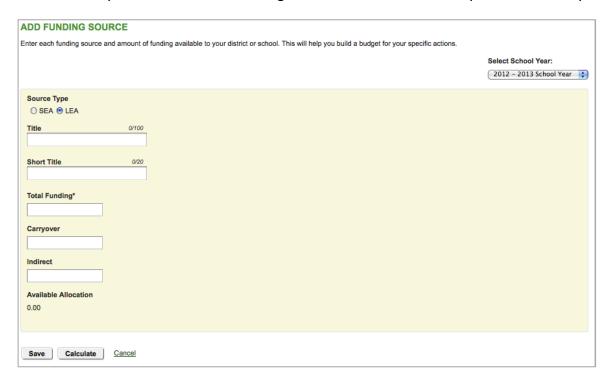
From any plan page, click the Budget tab at the top to see the overall plan budget. LEA or school Plan Administrators will see the **Add Funding Source** link.

Federal or State funding sources are created by the SEA, and may be selected for use in LEA and school plans. LEA Administrators may also create local funding sources. On the Add Funding Source screen, select SEA or LEA to add a new source. SEA funding sources will allow you to select from a dropdown list of all available Federal and State sources. (NOTE: If you have already added a source to your budget, you may edit it on the budget overview page. It will no longer appear in the drop-down list.) An LEA funding source requires a title and short title, as well as funding amounts.

School Plan Administrators will select from a single dropdown list of all funding sources added by the LEA. Funding sources must first be added to the LEA plan budget, and then may be added to the school plan budget.

Funding Sources include optional Carryover and Indirect amounts that may be used to help clarify total allocations. The Available Allocation is the sum of the Total Funding plus Carryover minus Indirect. This amount appears in the Total Allocation column in the plan budget. You may click **Calculate** to verify the amount before saving the record. These fields may be edited at any time.

Funding sources are immediately available for assignment to budget items in both the LEA and School plans.

Help

If you need assistance or have any questions about the user guide or the DMI Tracker system, please contact:

Becky Peters	Ann White	Sarah Moore
Becky.peters@schools.utah.gov	Ann.white@schools.utah.gov	Sarah.moore@schools.utah.gov
801-538-7712	801-538-7827	801-538-7756

Refer to the Help page (after logging in) or the Login page for information on who to contact if you have questions about using Tracker. For additional details on the Help page, see the Getting Help section in this user guide.

End User System Guidelines

Tracker runs on Mac or PC platforms. It requires an active Internet connection, and either Internet Explorer v.7.0 or above, or Firefox v.2.0 or above web browsers. Other browsers and tablet devices will likely work, but we do not guarantee support for them. The system itself does not require available local disk space, but it is advisable to have space on your computer when viewing documents stored on the system.

Document scanners or other imaging devices are useful when creating electronic versions of printed documents, but they are not required.

User names and system notifications require a valid e-mail address for each user. Please note that e-mail servers for schools, LEAs and community-based offices may have security settings that block messages from DMI Tracker. If users are not receiving DMI Tracker invitations and messages, the USOE can work with your IT department so that automated messages can be delivered to your servers from IP address 198.60.12.* (or .9 in place of the star) can get through local firewalls. Auto-generated messages and emails will come from DMI.helpdesk@schools.utah.gov and adding this address to your 'white list' will help these messages get through to you.

Accessing DMI Tracker

To access DMI Tracker, individuals must be invited by an administrative user. Users will receive an email invitation from DMI.helpdesk@schools.utah.gov with instructions for creating an account. The invitation email includes a web link that the user will access to accept the invitation. Enter your e-mail address and a password that follows the required guidelines:

- At least 8 characters long
- At least 1 each, upper case and lower case letters
- At least one number
- At least one special character (for example: %, #)

Once the system accepts your new password, you will be redirected back to the login screen. Use your email address and your new password to login.

If you have forgotten your password, use the password recovery tool on the Logon screen by clicking **Reset Password**.

Enter your e-mail address on the next screen and click **Send Invitation Now** to receive a new login invitation via e-mail that will allow you to create a new password.

Getting Help

Access the Help page by clicking the **Help** link at the top right corner of any screen.

The Help page contains documents and links provided by the USOE to help assist in using the system or working with specific content areas. You may sort the list by Category to find the type of resource you need. Click the **Download** link to download any file and click the **Go to URL** link to view the web link resource